

## Offboarding Checklist

Upon Notification of Retirement
<b>Shared Responsibility – Employee/Manager</b>
<p>Initiate <a href="#">Knowledge Creation and Transfer Worksheet</a></p> <ul style="list-style-type: none"> <li>Develop a plan to document critical knowledge, skills, and responsibilities               <ul style="list-style-type: none"> <li>Transition plan and handover duties</li> <li>Who will take on these responsibilities?</li> <li>What training is required?</li> </ul> </li> <li>Create a centralized knowledge repository for documentation (Teams)</li> <li>Review of Systems Access (i.e. Financial Systems, Banner)               <ul style="list-style-type: none"> <li>Record systems the employee has access to</li> <li>Contact ITS or Financial Systems (as required)</li> </ul> </li> <li>Commence Administrative Access Changes               <ul style="list-style-type: none"> <li>Identify any administrative access (i.e. subscriptions, social media, software, Teams sites, Jira groups, shared mailboxes, Outlook groups)</li> <li>Transfer administrative rights, change passwords, transfer desktop phone</li> <li>Contact ITS (as required)</li> </ul> </li> </ul> <p>Initiate Records Management - the transfer of information, data, and files</p> <ul style="list-style-type: none"> <li>Review <a href="#">Records Management Offboarding Checklist</a></li> <li>Contact Records Management for assistance</li> </ul> <p>Review of Employee-held Carleton Equipment</p> <ul style="list-style-type: none"> <li>Identify what needs to be returned</li> <li>Types of equipment for consideration: Computer, laptop, keyboard, mouse, headsets, monitors, web cam, uniforms</li> </ul>
<b>Management Responsibility</b>
Contact ITS if approving cell phone and/or cell phone line transfer to employee

**One Month Before Retirement Date**

**Employee Responsibility**

- Submit annual leave requests
- Stop using PCard, ECard and Amex
- Reconcile PCard, ECard and Amex transactions
- Approve any outstanding requests (as required)
- Remove personal information from laptop and phone
- \*This information will not be available after your retirement date.
- Review Records Management checklist
  - Transfer information, data and records
- Provide status updates to your manager

Additional Resources: <https://carleton.ca/procurement/pcard-procedures/>

**Management Responsibility**

- Complete [Confirmation of Leave Balances Report](#) and submit to [Payroll](#)
- Review progress on knowledge transfer and records management
- Approve reconciled outstanding PCard, ECard, and Amex transactions
- Approve expenses from Concur

**Two Weeks Before Retirement Date**

**Employee Responsibility**

- Contact ITS for cell phone transfer (if applicable)
- Provide your manager with an update on your progress on knowledge transfer and record management.

**Management Responsibility**

- Review progress on knowledge transfer and records management
- Check-in with team on transition of duties (as required)

<b>One Week Before Retirement Date</b>	
<b>Employee Responsibility</b>	Complete transfer of personal information and files from the work computer/cell phone to personal systems
<b>Management Responsibility</b>	Formal hand over and review of knowledge transfer and records management

<b>One Day Before Retirement Date</b>	
<b>Employee Responsibility</b>	Complete cell phone transfer if you are keeping phonenumber and/or phone. *Phone will be suspended until transfer is complete.

<b>Last Day</b>	
<b>Employee Responsibility</b>	Return Carleton Equipment to Department: <ul style="list-style-type: none"> <li>Computer/Laptop</li> <li>Computer peripherals (keyboard, mouse, thumb drives, headsets, monitors, cables)</li> <li>Furniture (desk, chairs)</li> <li>Keys</li> <li>PCard/Ecard/Amex</li> <li>Other university owned equipment</li> <li>Campus Card – cards for retirees are available through the Campus Card Office</li> </ul>
<b>Manager Responsibility</b>	Destroy PCard/ECard/Amex

**Following Day**

**Manager Responsibility**

Follow up access is removed  
ITS – Service Desk  
Financial Systems